File Naming Protocol

We have found that having a naming protocol for files and folders (hard copies and electronic) avoids confusion, and can lead to valuable time-savings. It is easy to do and we use a basic alpha-numeric system. There is no specific convention for the style that works best. **There is no perfect system.** It is whatever works best for your organization. Using printed labels enhances the system making them easier to read and file.

GRANTOR . current owner . year . category of document

Categories of documents are generally limited to
- cor = correspondence
- mon = monitoring report
- memo = external memo
- file = internal file

Any place we need to distinguish between two properties we may add in first name initials or acreage. Occasionally you have two family members with the last name or a property is split. In the following, the original Grantor of 50 acres was Smith:

SMITH. 01.cor.doc

It was subsequently inherited by Jones:

SMITH.jones.03.cor.doc
SMITH.jones.03.mon.doc
SMITH.jones.03A.cor.doc (another letter was written in the same year, "A")

The property was split as allowed in the deed:

SMITH.jones36.05.cor.doc
SMITH.jones24.05.cor.doc

There are occasions when something might get out of sequence, but you will still end up with a pattern that can be readily understood. An example would be if Jones24 sold the property to Bell in 2006, the B would cause the documents created in 06 to come before the 05 in the sequence. However, knowing the pattern you would be able to understand this.

Having a statewide scope for our program we do all our files are alphabetical by Town first. Since we do work for several agencies, and land was protected under different programs we have also color-coded our files. Our main goal is creating a system that someone can easily understand and navigate when we are gone.